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FARMER-TO-CONSUMER DIRECT MARKETING OPERATIONS SELLING FRUITS AND VEGETABLES, NEW YORK, 1979

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ABSTRACT

The number of major direct farmer-to-consumer marketing operations for fruits and vegetables in each county in New York State was obtained by mail questionnaire from county Extension staff in 1979. This survey of direct marketing operations was first started in 1964 and has been updated at five-year intervals since then.

All of the direct marketing operations (commercial roadside markets, small markets, pick-your-own farms, and retail farmers' markets) gained in number since 1974. Direct marketing operations showing the greatest percentage increases were farmers' markets, which went from 30 to 89 markets, a gain of 197 percent; and pick-your-own operations, which almost doubled in number, from 335 to 639.

The number of commercial roadside markets increased by 26 percent and the number of small markets gained by 17 percent.

Other comparisons with the 1974 and earlier data are reported as well as a regional analysis of market changes. Regional gains generally followed the statewide experience for pick-your-own farms and retail farmers' markets but were mixed for commercial and small roadside markets. Predictions for future growth for each type of operation were also reported.

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FARMER-TO-CONSUMER DIRECT
MARKETING OPERATIONS SELLING FRUITS AND
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Emilie M. Stuhlmiller^{1,2}

INTRODUCTION

A mail survey of the number of roadside markets in New York State, based on estimations made by Extension field staff, has been undertaken at five-year intervals since 1964. The original survey of the number of commercial roadside markets was made by Ransom A. Blakeley³ in 1964. Followup surveys, in 1969 and 1974, were done by the late Philip A. Minges, Department of Vegetable Crops, Cornell University.⁴

The first survey requested information only about the number of commercial roadside markets used by farmers to sell their fruits and vegetables directly to the public. In 1969 information about the number of small or temporary markets used by farmers to sell produce was obtained, and in 1974 the number of planned pick-your-own (U-pick or customer harvesting) operations was collected for the first time.

The purpose of these surveys has been to obtain information about the number of direct marketing operations used by farmers to sell their fruits and vegetables to consumers and to analyze market trends over time. Although other agricultural products are sold by farmer-producers to the public using these same types of direct marketing outlets, this survey has been concerned only with the number of businesses selling fresh produce.

This survey does not provide information about the volume and kinds of agricultural products sold directly by farmer-producers to consumers or the gross value of these sales. Information about the extent and value of direct sales of agricultural products (fruits; vegetables; livestock,

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² Appreciation is extended to R. Brian How for helpful comments regarding this report and to the Cooperative Extension field staff who provided the 1979 information about the number of direct marketing operations in their counties.

³ Former staff member and currently Senior Extension Associate, Department of Agricultural Economics.

⁴ See "Roadside Market Survey-New York, 1969-1974," Department of Vegetable Crops, VC-178, 1975.

poultry or miscellaneous products including eggs, honey, cider, maple syrup; nursery or greenhouse products) in New York State will be obtained from a direct marketing survey conducted in December 1979 by the Economics, Statistics and Cooperative Services (ESCS), United States Department of Agriculture, through the New York Crop Reporting Service. Approximately 1,400 farmers were contacted.¹ Survey results are expected to be available by Summer 1980.

New York State is one of nine states involved in the second round of this federal direct marketing survey, mandated by the Farmer-to-Consumer Direct Marketing Act of 1976.

1979 Survey Procedure

The same data collection procedure (mail questionnaire to Extension field staff) and definitions for commercial and small roadside markets were used in 1979 as in previous surveys. The following data were requested for each county:

1. The number of commercial roadside markets (permanent facilities, substantial sales, provide much of family income, some of produce grown by the operator and some could be purchased for resale);
2. The number of small roadside markets (temporary or table top, including such arrangements as selling from a temporary stand, tent, mobile wagon or sales from house or porch. Some or all of produce grown by the operator, could also have some produce purchased for resale);
3. Number of above operations that sold: vegetables only, fruit only, both fruit and vegetables, and those that sold ornamentals (vegetable transplants, bedding plants, etc.) in addition to the vegetables and/or fruit;
4. Number of operations producing for pick-your-own;
5. Number of pick-your-own operations selling: vegetables only, fruit only, both fruit and vegetables;
6. Number of markets where all the produce sold is purchased for resale (e.g., roadside markets where none of the produce is grown by the operator, specialty produce stores but not grocery stores or supermarkets);

¹ Glen Suter, New York Crop Reporting Service, Albany, New York, January 11, 1980.

7. Number of garden centers selling ornamentals (including vegetable transplants and bedding plants);¹
8. Whether or not a locally prepared directory of roadside markets and pick-your-own farms was prepared for county distribution;
9. The number and location of retail community farmers' markets in the county.

Items 6-9 were added to the questionnaire for the first time in 1979.

County Extension staff may not have a complete record of all of the direct-to-consumer operations selling vegetables, fruit, and nursery and greenhouse products in the county but their approximations are likely to be more accurate than others.

After a pretest in three counties, the questionnaire and an accompanying cover letter (copies in Appendix) were mailed to Extension field staff, Agriculture. The questionnaire was sent in August, with follow-up questionnaires and telephone calls made in September and October.

The information was supplied by an agricultural agent in most counties. In some instances a regional Extension specialist or an agent with regional responsibilities in fruit or vegetables provided the data. In a few counties, an Extension staff member with horticultural program responsibilities was also consulted for information about the number of garden centers and greenhouses.

Responses were received from the questionnaires and telephone follow-up calls from the 57 counties outside of New York City. An estimate of the number of resale produce stores, pickup truck operations, and garden centers in New York City was obtained from a staff member, Cooperative Extension Urban Gardening Program, New York City. Information about the number of roadside markets in New York City and in Nassau County was acquired from a staff member, New York State Department of Agriculture and Markets, New York City Office.

In addition, the regional directories, "A Guide to Farm Fresh Food," prepared by the New York State Department of Agriculture and Markets, were used in some counties as a recall aid during telephone conversations with Extension staff to help estimate the number of direct sales operations in the county. The number of roadside markets, pick-your-own farms, and retail farmers' markets listed in these directories served only as a reference point as not all growers elect to list their direct marketing businesses.

¹ Greenhouses were also included, but not commercial enterprises of a corporate nature. It is the intent of this survey to obtain information about the number of sales operations used by farmers to sell fruit and vegetables directly to the public, and which do not involve any intermediate marketing functions.

DIRECT MARKETING OPERATIONS 1979

In 1979 there were 1,064 commercial roadside markets and 1,812 small or temporary markets, making a total of 2,876 such operations.¹ Almost all (88 percent) of these markets sold vegetables and three-quarters sold fruit. About 20 percent sold ornamentals such as bedding plants and vegetable transplants in addition to vegetables and/or fruit. Forty-five percent sold both fruit and vegetables² with relatively few markets selling only vegetables (25 percent) and still fewer (12 percent) selling only fruit (Table 1).

There were 639 farms producing for pick-your-own sales. More fruit than vegetable farms sold produce on a pick-your-own basis, with 79 percent selling fruit and 56 percent selling vegetables. Approximately one-third of the farms offered both fruit and vegetables for sale. About one-fifth (21 percent) of the farms sold only vegetables in contrast to the 44 percent which sold only fruit (Table 1).

Statewide there were 89 retail community farmers' markets (Table 1). Twelve of these markets were located in New York City with 77 situated in 39 upstate counties.³ In addition there were farmers' markets at three service areas, New York State Thruway, sponsored by the New York State Department of Agriculture and Markets.

About 376 markets in New York State (excluding New York City) sold only produce purchased for resale (Table 1). For New York City it was estimated that resale produce was sold from 600 or more shops or pushcarts. In addition 100 or more pickup trucks come into the city, loaded with seasonal produce either grown by the operator or purchased from other farmers or Hunts' Point Terminal Market. These pickup trucks are driven to various districts of the city where the produce is sold.⁴

¹ The number of roadside markets (commercial and small) and pick-your-own farms by region and county, for 1974 and 1979, is included in the Appendix.

² Not all of the produce sold at farmer-operated roadside markets is grown by the farmer. Many market operators buy produce from other farmers or from wholesale outlets to supplement their own production or to provide a wider array of items for sale to their customers.

³ A list of farmers' markets by county and in New York City is included in the Appendix.

⁴ Information about the number of resale produce shops, pickup trucks, and garden centers in New York City was obtained from Kenneth Davies, Garden Assistant, Cooperative Extension Urban Gardening Program, New York City.

Table 1. NUMBER OF DIRECT MARKETING OPERATIONS AND NUMBER
AND PERCENT SELLING VEGETABLES, FRUIT, AND ORNAMENTALS
Survey of Direct Marketing Operations, New York State, 1979

Type of Operation	Number	Percent
Commercial roadside markets	1,064	--
Small roadside markets	<u>1,812</u>	--
Total	2,876	
Roadside markets selling:		
. only vegetables	732	25
. only fruit	350	12
. vegetables and fruit	1,283	45
. vegetables, fruit & ornamentals	<u>511</u>	<u>18</u>
Total	2,876	100
Farms producing for pick-your- own sales:	639	--
Pick-your-own farms selling:		
. only vegetables	136	21
. only fruit	278	44
. vegetables and fruit	<u>225</u>	<u>35</u>
Total	639	100
Retail community farmers' markets	89	
Markets buying all of produce for resale	376*	
Markets or garden centers selling only ornamentals	1,209*	

* Estimates for New York City not included.

For New York State (excluding New York City) there were 1,209 garden centers and greenhouses selling nursery, ornamentals, and related plant materials. It was learned from follow-up telephone calls to a few counties that some garden centers sell, in addition to plant and nursery materials, seasonal items such as apples, cider, pumpkins, etc., as traffic builders or to extend the market season. These businesses were counted as garden centers as the major portion of the gross sales income came from the sale of plants and related materials.

An estimate of 52 garden centers was reported for New York City.

CHANGES OVER TIME

All types of direct marketing operations increased in number, some more dramatically than others since 1974. The two types of marketing operations which showed the greatest percentage increase during the past five years were the retail community farmers' markets and the pick-your-own farms. The number of farmers' markets tripled in number (from 30 markets in 1974 to 89 in 1979, an increase of 197 percent) and the number of pick-your-own farms almost doubled, from 335 to 639, a 91 percent increase (Table 2).

Table 2. NUMBER OF DIRECT MARKETING OPERATIONS
AND PERCENTAGE CHANGES, 1964-1979
Survey of Direct Marketing Operations,
New York State, 1979

Type of Operation	1964	1969	1974	1979	Percentage Change	
					1964-1979	1974-1979
Commercial road- side markets	483	821	847	1,064	120	26
Small roadside markets	N.A.*	1,273	1,553	1,812	42**	17
Pick-your-own farms	N.A.	N.A.	335	639	--	91
Retail farmers' markets	6	6	30	89	1,383	197

* Not available.

** Based on data from 1969-1979.

SOURCES: 1964: Blakeley, Ransom A.

1969, 1974: Minges, P.A., "Roadside Market Survey-New York, 1969-1974" Mimeographed. Ithaca, NY: Cornell University, Department of Vegetable Crops, VC-178, 1975.

Farmers' markets 1964-1974: Pease, Richard L. and Doyle A. Eiler. Farmers' Markets Return. Dep. Agr. Econ. A.E. Ext. 76-14, Cornell University, 1976.

In comparison, the rate of increase of the number of commercial and small roadside markets has been modest since 1974. The number of commercial markets increased by 26 percent. In the 15-year period that data have been collected about the number of commercial roadside markets, the number of these establishments has more than doubled, increasing from the 483 enumerated in 1964 to 1,064 in 1979, a gain of 120 percent (Table 2). The greatest increase in the number of these markets occurred from 1964 to 1969, with a leveling off during 1969-1974, and then a modest increase from 1974-1979 (Figure 1).

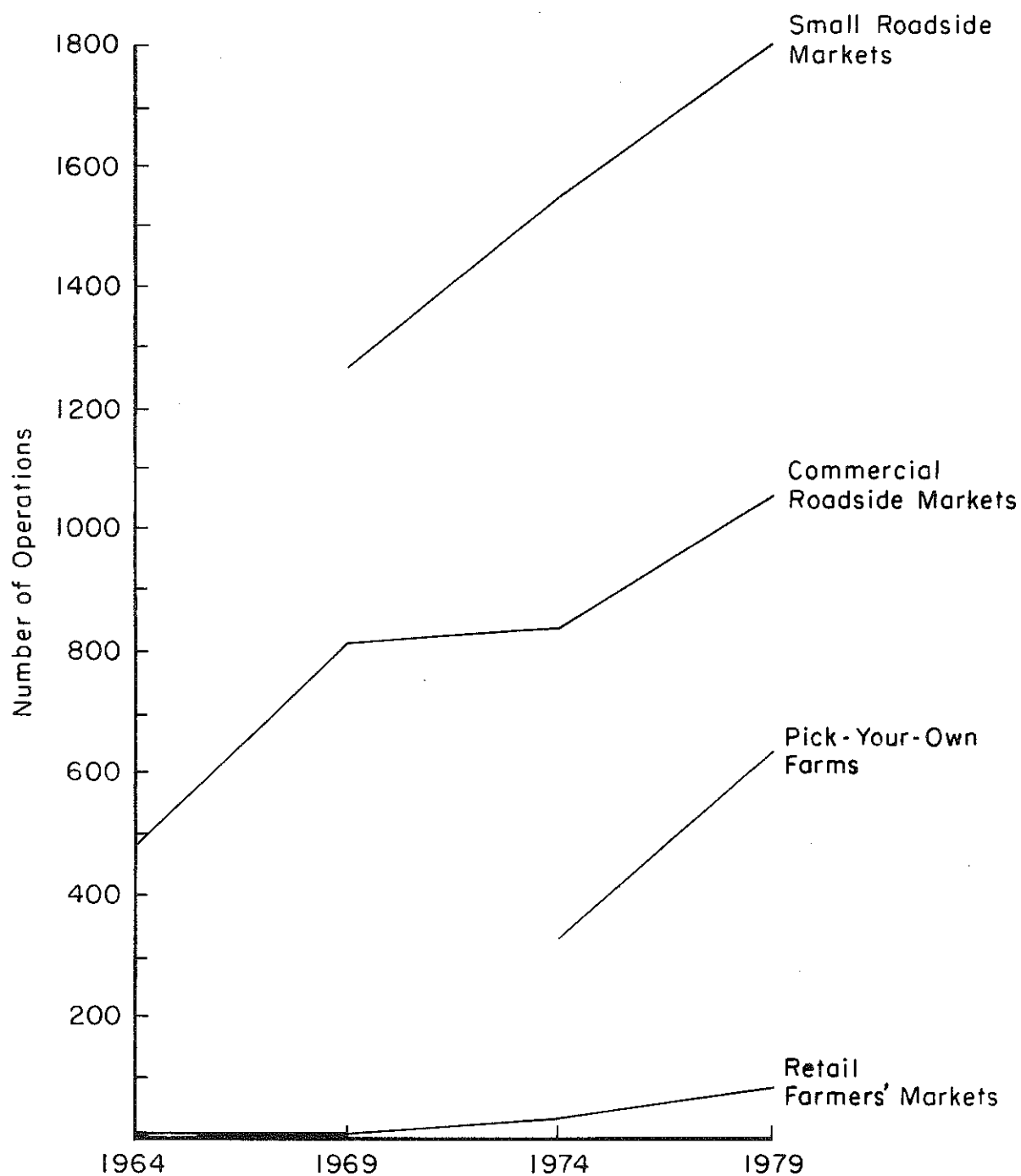
The number of small or temporary roadside markets increased by 42 percent since 1969, when the data were first collected. From 1969 to 1974 the number of small markets increased by 22 percent, with a 17 percent increase from 1974 to 1979. Despite the relative ease of entry into the business and the lower initial and operating costs (compared with a commercial market), the number of small markets has not expanded as rapidly as have the other types of marketing operations (Table 2). There may be more small markets but the temporary nature of some of these operations (e.g., selling sweet corn or pumpkins from a card table on the front lawn while the crop is available) makes it difficult to obtain a fairly reliable estimate.

There were six retail farmers' markets both in 1964 and 1969, located in four upstate counties (Erie, Monroe, Niagara, and Onondaga). From 1969 to 1974, 24 additional markets were started, making a total of 30 markets operating in 19 upstate counties (Pease and Eiler, pp. 9-12). Since 1974, 59 other markets were established, so that by the end of 1979 there were 77 markets in 39 upstate counties, plus 12 markets in New York City for a total of 89.¹ From 1964 to 1979 the number of farmers' markets in the State increased by 14 times; from 1974 to 1979 the number almost tripled (Table 2).

The rapid growth in the number of farmers' markets in the State in recent years may explain the modest increase in the number of small roadside markets. Farmers' markets provide another outlet for growers to sell their produce without the involvement of operating and manning a market. The selling of produce at a farmers' market is generally concentrated within a few hours time, with the administrative and publicity details of market operation left to the market manager or sponsor.

¹ Not included in this enumeration are farmers' markets at three service areas, New York State Thruway, and a number of one-day farmers' markets held in various communities throughout the State in 1979. These one-day markets were usually held as a part of a local promotional or special community event.

FIGURE 1.
NUMBER OF DIRECT MARKETING OPERATIONS, BY TYPE OF OPERATION,
1964-1979, Survey of Direct Marketing Operations, New York State, 1979



REGIONAL CHANGES

Changes in the number of direct marketing operations on a regional basis between 1974 and 1979 were compared. For this analysis the counties were divided into regions, using the same division as made by the New York State Department of Agriculture and Markets for their regional farm fresh produce directories. These five regions are as follows:¹

1. Metropolitan: Nine counties in southeastern New York including Nassau and Suffolk Counties on Long Island, and New York City.

2. Eastern: The largest region with 19 counties, from St. Lawrence, Franklin, and Clinton to the north and Delaware, Greene, and Columbia to the south. The region was subdivided into two sections: northern (7 counties) and southern (12 counties). This was done (1) because of the size of the region and (2) to determine if there were any differences between the two sections, as the southern portion of the region includes several counties (e.g., Albany, Columbia, and Rensselaer) with a long history of direct marketing activities.

3. Central: Fifteen counties, from Jefferson, Oswego, and Lewis Counties to the north to Chemung, Tioga, and Broome to the south.

4. Genesee: Seven counties (Monroe, Wayne, Livingston, Ontario, Allegany, Steuben, and Yates).

5. Western: Seven counties (Niagara, Orleans, Genesee, Erie, Wyoming, Chautauqua, and Cattaraugus).

The regional analysis revealed different patterns compared to the statewide findings.² The change in the number of commercial roadside markets ranged from a decrease of 18 percent in the Genesee Region to an increase of 134 percent in the Western Region, and an average increase for the State of 26 percent. The number of markets in the Metropolitan and Central Regions increased by about the same percentage as for the State. For the Eastern Region, the number of commercial markets increased by seven percent, with the northern counties showing more growth (14 percent) than the southern portion of the region (three percent) (Table 3). Many

¹ See New York State map, Figure 2.

² The regional rate of growth did not apply to all of the counties within the region. Generally growth in a particular type of direct marketing operation occurred in a few counties in the region with the other counties either remaining relatively stable or showing a decline in numbers (Tables 6-10 in the Appendix).

FIGURE 2.
NEW YORK STATE
Regional Analysis, Direct Marketing Changes, 1974 - 1979

EASTERN REGION
19 Counties, Subdivided



GENESEE REGION
7 Counties

CENTRAL REGION
15 Counties

METROPOLITAN REGION
9 Counties and
New York City

A stylized map of New York City and its surrounding areas. The map is divided into several regions, each labeled with a borough or county name. The labels are: BRONX (top left), NEW YORK (center left), QUEENS (center), NASSAU (center right), SUFFOLK (top right), KINGS (bottom center), and RICHMOND (bottom right). The map uses a simple, abstract style with black outlines and white space to represent the geographical features.

roadside markets are already in business in the southern portion of the Eastern Region and, consequently, there may be fewer opportunities for new markets to start.

The number of small roadside markets increased in three of the five regions and declined in two. Gains in market numbers were found for the Genesee Region (21 percent), Metropolitan Region (45 percent) and Western Region (60 percent). The number of small markets decreased by seven percent for the Central Region and by 14 percent in the Eastern Region. The statewide increase was 17 percent (Table 3).

Table 3. CHANGE IN NUMBER OF COMMERCIAL AND SMALL
ROADSIDE MARKETS, BY REGION, 1974 to 1979
Survey of Direct Marketing Operations, New York State, 1979

Region	Commercial Markets			Small Markets		
	1974	1979	Change	1974	1979	Change
	-number-		percent	-number-		percent
Metropolitan (9 counties & NYC)	302	372	23	289	419	45
Eastern (19 counties)	184	196	7	373	321	-14
Northern counties (7)	(59)	(67)	(14)	(100)	(91)	(- 9)
Southern counties (12)	(125)	(129)	(3)	(273)	(230)	(-16)
Central (15 counties)	127	155	22	349	323	- 7
Genesee (7 counties)	136	112	-18	300	363	21
Western (7 counties)	98	229	134	242	386	60
Statewide	847	1,064	26	1,553	1,812	17

The number of farms producing for pick-your-own sales increased in all five regions since 1974. The increases ranged from 72 percent for the Metropolitan Region to 116 percent for the Central Region. Within the subdivided Eastern Region, the use of pick-your-own marketing grew by 408 percent in the seven northern counties and by 17 percent in the 12 southern counties of the region. The increase for the State in the number of pick-your-own farms was 91 percent (Table 4).

Table 4. CHANGE IN NUMBER OF PICK-YOUR-OWN FARMS
AND RETAIL FARMERS' MARKETS, BY REGION, 1974 to 1979
Survey of Direct Marketing Operations, New York State, 1979

Region	Pick-Your-Own Farms			Retail Farmers' Markets		
	1974	1979	Change	1974	1979	Change
	-number-		percent	-number-		percent
Metropolitan (9 counties & NYC)	65	112	72	1	19	1,800
Eastern (19 counties)	77	137	78	8	23	188
Northern counties (7)	(12)	(61)	(408)	(6)	(10)	(67)
Southern counties (12)	(65)	(76)	(17)	(2)	(13)	(550)
Central (15 counties)	68	147	116	10	26	160
Genesee (7 counties)	47	96	104	4	10	150
Western (7 counties)	78	147	88	7	11	57
Statewide	335	639	91	30	89	197

Retail farmers' markets also increased in number in all five regions. The percentages ranged from 57 percent for the Western Region¹ to 1,800 percent for the Metropolitan Region (Table 4). The increase for the State was 197 percent. The greatest gain was in the Metropolitan Region, where there was one market in 1974; in 1979 there were 19. Twelve of these new markets were in New York City, with the remaining six located in four counties in the region.

The growth of farmers' markets in the Eastern Region occurred in the southern portion of the region, where 11 markets were started in eight counties since 1974. During the same period, five new markets were organized in three counties in the northern portion of this region.²

¹ Four farmers' markets in two counties were started since 1974 in the Western Region. Several farmers' markets have been in operation for many years in Erie and Niagara Counties.

² One market started in 1973 in Clinton County stopped operating, making a total increase of 15 markets from 1974-1979, as shown in Table 4.

Comparison of the changes in the number of direct marketing operations among the five regions and statewide presents a mixed picture, with noticeable fluctuations in both growth and decline. All of the regions had a major increase in the number of farms producing for pick-your-own harvesting and, in four of the five regions, the retail farmers' market was the direct marketing operation showing the greatest gain. Changes in the number of commercial and small roadside markets by region were more varied, with three regions showing losses in either the number of commercial roadside markets or small markets (Table 5).

Table 5. PERCENTAGE CHANGE IN THE NUMBER OF DIRECT MARKETING OPERATIONS, BY TYPE OF OPERATION AND REGION, 1974 to 1979
Survey of Direct Marketing Operations, New York State, 1979

Type of Operation	Regions					State-wide
	Metro-politan	Eastern	Central	Genesee	Western	
	-percent-					
Commercial markets	23	7	22	-18	134	26
Small markets	45	-14	-7	21	60	17
Pick-your-own farms	72	78	116	104	88	91
Farmers' markets	1,800	188	160	150	57	197

Major changes in direct marketing operations occurring within each region when compared with the other regions and statewide were as follows:

1. Metropolitan Region: This region had the greatest increase in the number of farmers' markets and the second highest increase in the number of small roadside markets.

2. Eastern Region: This region had the smallest gain in the number of commercial roadside markets and a decline in the number of small markets.

3. Central Region: This region had the largest increase in the number of pick-your-own farms and was one of two regions with a decline in the number of small roadside markets.

4. Genesee Region: Only region to have a decline in the number of commercial roadside markets; second highest increase in the number of pick-your-own farms.

5. Western Region: This region had the greatest gain in both the number of commercial and small roadside markets and the smallest increase in the number of farmers' markets (Table 5).

This regional analysis also lends support to the statement made earlier that the substantial increase in the number of farmers' markets may be a factor in the modest increase in the number of small roadside markets. In three of the five regions there were major increases in the number of farmers' markets and either a decline or modest increases in the number of small roadside markets. For the Metropolitan Region there was a more than double the statewide increase in the number of small markets and the highest percentage increase in the number of farmers' markets. In the Western Region the percentage increase in the number of farmers' markets and small roadside markets was about the same (Table 5).

The extent to which farmers are substituting selling at farmers' markets instead of operating small roadside stands at their farms needs more investigation and data than are available from this survey.

PROJECTED TRENDS

The number of direct marketing operations in New York State has continued to increase according to data collected at five-year intervals since 1964 (Table 2 and Figure 1). Statewide increases for the various types of operations have been uneven with some direct marketing methods making greater gains than others. The overall trend has been upward, indicating that more farmers are turning to direct marketing as a way of selling their produce to consumers either at their farm or at retail farmers' markets. What are the prospects for continued growth of these operations during the next five years?

Direct marketing specialist, Ransom A. Blakeley, Department of Agricultural Economics, Cornell University, in a December 1979 presentation on the outlook for direct marketing in 1980, predicted that the number of commercial roadside markets would continue to grow but at a slower rate than in the past. This slower rate of growth he indicated was due to the higher costs of erecting a permanent marketing building, more stringent local and health regulations, and the near-saturation of roadside markets in some parts of the State. Blakeley also predicted an increase in the number of small roadside markets, as a response to current economic conditions whereby retired and unemployed persons might start small or temporary markets as a means of increasing family income (pp. 6-9).

The number of farms producing for pick-your-own has almost doubled since the data were first collected in 1974. Blakeley questioned whether this rate of increase could continue in view of the current fuel situation (p. 9). High gasoline costs could also reduce the number of pick-your-own customers particularly for those farms located near small population centers or more than 20 miles from their customers. In a study of customer distribution and purchases on selected pick-your-own farms in Illinois, J. W. Courter and associates found that over 75 percent of the strawberry U-pick customers lived within 20 miles of the farm (p. 48).¹

Farmers' markets in 1979 were located in New York City and in 39 of the State's 57 counties (outside of New York City). With approximately 90 retail farmers' markets already in existence in the State it does not seem likely that the rate of increase in the next five years will be as high as it has been. Market numbers will probably level off between 100 and 125 during the next five years, as new markets start up and other marginal ones close down.

¹ For more information see "Customer Distribution and Purchases on Selected Pick-Your-Own Strawberry Farms in Illinois," Proceedings, 1979 Illinois Strawberry School, Horticulture Series 14, University of Illinois, Dixon Springs Agricultural Center, Simpson, Illinois, March 1979, pp. 40-49.

In the 18 counties which did not have farmers' markets in 1979, some have had markets in the past which closed down, and others have groups currently working to start markets. Conditions present in some of these counties which may hinder or preclude the development of farmers' markets include small centers of population with too few customers to support a viable market, not enough vegetable or fruit growers to maintain the market over the season, the existence of farmers' markets in neighboring counties which attract the local farmers, or commercial growers raising crops primarily for processing and who are not interested in selling smaller amounts of produce at a farmers' market.

The area of the State with the greatest potential for continued growth in the number of farmers' markets is New York City and Long Island. Twelve farmers' markets have been established in New York City since the 1974 survey, including 10 Greenmarkets under the sponsorship of the Council on the Environment of New York City.¹ At the time of this writing, there are no farmers' markets in Nassau and Suffolk Counties.

The main limitations in starting new farmers' markets in New York City, according to Barry Benepe, Director, Greenmarkets, have been the difficulty in obtaining suitable permanent sites for the markets and an unsympathetic city administration. These have limited opportunities for expansion despite consumer demand for locally produced agricultural products. Benepe found as new Greenmarkets were started that farmers selling at existing Greenmarkets expanded their businesses to include selling at the new locations.

As the growth in the number of farmers' markets levels off, the direction emerging now is one of strengthening market operation so the markets will survive as viable economic entities, serving the interests of farmers, customers, and sponsors. Past Cooperative Extension program efforts with farmers' markets have been primarily in working with local groups to organize new markets. Now the focus is changing to one of working with managers and sponsors in market management and development so the markets will continue to function as another outlet for direct farmer-to-consumer selling of agricultural products.

The Department of Agricultural Economics and Cornell Cooperative Extension have conducted two educational programs designed to assist managers and sponsors with market management. Conferences held in 1979 and 1980 focused on organizational and operational concerns, and were attended by managers, sponsors, vendors, and other interested person. Although a long-term follow-up is not planned, the majority of persons attending these conferences who returned the evaluation form indicated they found the programs helpful and were interested in attending future similar meetings.

¹ Twelve Greenmarkets are planned for 1980.

SUMMARY

A follow-up survey of the number of direct marketing operations used by farmers in New York State to sell their fruits and vegetables directly to consumers was made in August 1979. This survey has been undertaken at five-year intervals since 1964, when the first estimate of the number of commercial roadside markets was made. In 1969 information about the number of small roadside markets was collected and in 1974 the number of planned customer harvesting operations (pick-your-own farms) was obtained. The purpose of the surveys has been to obtain information about the number of direct marketing operations in the State so as to examine trends over time.

As in past surveys, a mail questionnaire sent to Cooperative Extension field staff was used to collect the data for the 1979 survey. The agents were asked to give their best estimate of the number of direct marketing operations (commercial and small roadside markets, pick-your-own farms, and retail community farmers' markets) located within their counties. Also requested was the number of markets selling only produce purchased for resale (excluding grocery stores and supermarkets) and the number of garden centers, including greenhouses, which sold ornamentals, nursery plants, and other plant materials.

The same definitions for commercial and small roadside markets were used in all the surveys so the data are comparable. Commercial roadside markets were defined as markets having permanent facilities, substantial sales, and providing much of the family income. Small roadside markets were categorized as temporary or table type, including such selling arrangements as a temporary stand, tent, mobile wagon, or sales from a house or porch.

Replies were obtained from 57 counties in the State and for New York City.

Results indicated there were 1,064 commercial roadside markets and 1,812 small roadside markets, making a total of 2,876 such markets. Of these markets, 88 percent sold vegetables and 75 percent sold fruit. Eighteen percent sold ornamentals or other kinds of plants (e.g., vegetable transplants or bedding plants) in addition to vegetables and/or fruit.

Farms producing for pick-your-own sales numbered 639. Fruit sales predominated with 79 percent selling fruit and 56 percent vegetables. Forty-four percent of these farms sold only fruit, 21 percent sold only vegetables, and 35 percent sold both fruit and vegetables.

Seventy-seven retail farmers' markets were operating in 39 upstate counties and 12 were in New York City for a total of 89 in 1979. There were also farmers' markets at three service areas, New York State Thruway, which were maintained by five farmers.

Garden centers and greenhouses selling ornamentals, nursery plants, and other related materials numbered 1,209 for the counties outside New York City. In New York City, there were approximately 52 such operations.

There were about 376 markets selling only resale produce in the State excluding New York City. For New York City it was estimated that some 600 or more small shops, pushcarts, plus 100 or so pickup trucks sold produce, either purchased from farmers or from the terminal wholesale markets.

All four types of direct marketing operations gained in number since the 1974 survey, indicating that more farmers are using direct marketing to sell their fruit and vegetables.¹

The two types of marketing operations showing the greatest percentage increase since 1974 were the retail farmers' markets and the pick-your-own farms. The number of farmers' markets tripled in number, from 30 markets in 1974 to 89 in 1979, an increase of 197 percent. Pick-your-own farms almost doubled in number, from 335 to 639, an increase of 91 percent. The number of commercial roadside markets increased by 26 percent and small roadside markets gained by 17 percent. The rapid growth in number of farmers' markets may be one explanation for the modest increase in the number of small roadside markets.

A review of trends in market numbers has shown continued, if somewhat uneven growth, in the four types of direct marketing operations, since these data have been collected. Each five-year survey has found an increase in the number of commercial roadside markets. The number of small roadside markets has also increased since the data were first collected in 1969. Information from another source indicated that the number of farmers' markets was the same in 1964 and 1969 with a marked increase by 1974. Data about the number of pick-your-own farms were collected for the first time in 1974.

Changes in the number of direct marketing operations on a regional basis between 1974 and 1979 were compared. The regional analysis found

¹ The growth in the number of retail farmers' markets has added many more farmers to the ranks of direct marketers. Assuming 10 to 15 vendors per market, this would add from 900 to 1,350 farmers engaged in direct marketing to the 2,876 farmers operating roadside markets and the 639 managing pick-your-own farms. Duplication would need to be removed as some farmers use a combination of direct marketing operations. Even with this duplication removed, the increase in the number of direct market sellers would be sizable. More specific information about the number of farmers engaged in direct marketing, products sold, and the gross value of retail sales to consumers will be forthcoming from the ESCS survey conducted in New York State in December 1979 by the New York Crop Reporting Service.

that the number of farms producing for pick-your-own gained substantially in each of the five regions (from 72 to 116 percent) and the number of farmers' markets gained noticeably in four regions (from 150 to 1,800 percent).

Regional change in the number of commercial roadside markets ranged from a decline of 14 percent in one region to an increase of 134 percent. The number of small roadside markets increased in three regions from 21 to 60 percent, with losses of seven and 14 percent in the remaining two regions. At this time information is not available to determine if these regional losses are a one-time occurrence or the start of a trend. A similar regional analysis, included in the 1984 survey, should provide additional information to assess the relevance of this finding.

The regional analysis also provided some support for the observation that the substantial increase in the number of farmers' markets may be a factor in the modest increase in the number of small roadside markets. In three of the five regions there were marked increases in the number of farmers' markets and either a decline or modest increases in the number of small roadside markets. In one region, there were major increases in both the number of farmers' markets and small roadside markets; in another region, the percentage increase in the number of farmers' markets and small roadside markets was about the same. The extent to which farmers are substituting selling at farmers' markets instead of operating small roadside markets at their place of business needs more data and information than are available from this survey.

Future trends in the number of direct marketing operations were also discussed. In the opinion of Ransom A. Blakeley, Direct Marketing Specialist, Department of Agricultural Economics, there would be continued growth, but at a slower rate, particularly for some types of operations. The growth in the number of commercial roadside markets, he predicted, would be at a slower rate as a result of higher building costs, increased regulations, and the over-abundance of markets in some areas of the State. A possible increase in the number of small roadside markets was forecast, as current economic conditions might cause unemployed persons, retirees, and others to start small or temporary markets as a means of supplementing family income. In view of the current gasoline situation, the specialist indicated that the rate of growth in the number of pick-your-own farms probably would be lower than it was during the past five years.

In 1979 there were retail farmers' markets in about two-thirds of the counties in the State. It does not seem likely that the rate of increase in the number of new markets would continue at the same pace as had occurred during the past ten years. Although there are opportunities for new markets to start in some of the 18 counties which did not have farmers' markets in 1979, the greatest opportunity for market expansion is in New York City. The main limitations to market expansion there, in the opinion of the Greenmarkets' director, are the difficulty in finding suitable permanent market sites and an unsympathetic city administration.

Cooperative Extension program efforts with farmers' markets in recent years have been in working with local community groups to start markets. Now with about 90 markets in operation, the focus is changing to one of helping managers and sponsors to strengthen their management so the markets will survive as economic entities for the benefit of both farmers and consumers. To help meet this goal, two educational conferences on market management and operation were conducted for managers, sponsors, vendors, and other interested persons by the Department of Agricultural Economics and Cornell Cooperative Extension in 1979 and 1980.

In conclusion, the 1979 survey has provided additional information to the on-going data base about the major types of direct marketing operations in New York State. Both long-time and short-time statewide trends in market numbers were reported and benchmark data for evaluating regional changes were given. In need of further study is a possible relationship between the rapid growth in the number of farmers' markets and the slow increase in the number of small roadside markets to ascertain if farmers are substituting selling at farmers' markets instead of operating small roadside markets at their farms.

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APPENDIX

August 17, 1979

MEMORANDUM

TO: Extension Agents Involved in Direct Marketing
FROM: Emilie Stuhlmiller, Research Associate
RE: Questionnaire on Direct-To-Consumer Sales Operations

The enclosed questionnaire is a continuation of a survey started in 1964 by Ransom Blakeley and repeated in 1969 and 1974 by the late Dr. Philip Minges. Past response has been excellent and the data are very useful as a basis for estimating trends in market numbers.

We again request your cooperation in providing your considered estimate of the number of growers who sell some or all of their production (vegetables, fruit) directly to the consumer. We realize that you may not have a complete record of all the operations in your county that sell directly to the consumer; however, your approximation or "educated guess" is more accurate than any other available source.

Question 1 refers to the number of roadside market operations (permanent, temporary) in the county plus the number of markets which are 100 percent resale. Include also packing house operations if some of the produce is sold directly to the consumer.

Subsections 1a, 1b, and 1c categorize these operations into substantial roadside markets, temporary selling arrangements, and 100 percent resale markets.

Question 3 refers to the number of growers using pick-your-own (pyo) as a planned method of sales. The answer to question 3 may include operations listed in question 1a and 1b, as some growers use both roadside market and pyo to sell their crops.

Questions 5 and 6 are listed for the first time this year. Question 5 refers to a locally prepared directory or listing of roadside markets and pyo operations -- not the regional guides distributed by the NYS Dept. of Agriculture and Markets. The information from question 6 will help us to update our list of farmers' markets throughout the State.

If there are any questions, please call me at (607) 256-7681. Thank you for your help. After August 28, my new telephone number will be 256-5445.

EMS/ds

Please return by September 7, 1979 to:

Emilie Stuhlmiller
Dept. of Agricultural Economics
442 Warren Hall
Cornell University
Ithaca, N.Y. 14853

Name _____

County _____

QUESTIONNAIRE Direct-to Consumer Sales Operations, 1979

1. Number of retail market facilities in county where fruits and vegetables are sold directly to consumers (do not include community farmers' markets and grocery stores). _____

Number of above:

- a) that are substantial roadside markets, with permanent facilities, substantial sales, provide much of family income, some of produce grown by operator (some can be purchased for resale). Include packing house if direct sales are made. _____

- b) that are temporary or table top arrangements (such as a temporary stand, tent, mobile wagon or sales from house or porch). Some or all of produce grown by operator. _____

- c) where all of produce is purchased for resale. _____

2. Number of operations listed under 1a and b that sell:

vegetables only _____ both _____

fruit only _____ ornamentals in addition to vegetables and/or fruit _____

3. Number of operations producing for pick-your-own (pyo) sales (this can include operations listed under 1a and 1b above). _____

- a) Number of pyo operations selling:

vegetables only _____ fruit only _____ both _____

4. Number of markets or garden centers selling only ornamentals (include bedding plants, vegetable transplants, if sold). _____

Questionnaire cont'd.

5. Does your county Extension Office distribute a locally prepared listing of roadside markets and pyo operations? yes _____ no _____

(If yes, please send us a copy along with this questionnaire. Thank you.)

6. Number of community farmers' markets active in county in 1979. _____

For each farmers' market, please list the municipality where located and the name and address of the manager or sponsor.
(Please list additional markets on back.)

Table 6. NUMBER OF DIRECT MARKETING OPERATIONS,
BY REGION¹ AND COUNTY, 1974 and 1979
Survey of Direct Marketing Operations,
New York State, 1979

Metropolitan Region County	Direct Sales Operations						Retail Farmers' Markets ²	
	Roadside Markets				Pick Your Own Farms		1974	1979
	Commercial		Small					
	1974	1979	1974	1979	1974	1979	1974	1979
Nassau		7		0		1	0	0
Suffolk	150		55		20		0	0
New York City	0	2	0	0	0	0	0	12
Dutchess	20	40	50	160	6	20	1	1
Orange	40	30	100	100	8	17	0	3
Putnam	8	6	15	2	1	1	0	0
Rockland	10	16	6	0	3	4	0	0
Sullivan	2	6	5	12	2	6	0	0
Ulster	37	75	40	25	15	20	0	1
Westchester	35	25	18	25	10	3	0	2
Total	302	372	289	419	65	112	1	19
Regional change 1974-79		23%		45%		72%		1,800%

¹ The regions and counties within each region correspond to the ones used in the directories, "A Guide to Farm Fresh Food," prepared by the New York State Department of Agriculture and Markets.

² Information about the number and location of retail farmers' markets in 1974 for Tables 6-10 was obtained from Farmers' Markets Return by Pease and Eiler.

Table 7. NUMBER OF DIRECT MARKETING OPERATIONS,
BY REGION AND COUNTY, 1974 and 1979
Survey of Direct Marketing Operations,
New York State, 1979

Direct Sales Operations								
Eastern Region	Roadside Markets				Pick Your Own Farms		Retail Farmers' Markets	
County	Commercial		Small					
	1974	1979	1974	1979	1974	1979	1974	1979
Northern Section								
Clinton	26	25	30	10	3	10	1	0
Essex	8	10	10	30	0	17	0	2
Franklin	3	4	15	13	0	1	1	1
Hamilton	0	0	0	0	0	0	0	0
Herkimer	14	18	25	6	8	18	0	2
St. Lawrence	5	8	15	30	1	15	4	4
Warren	3	2	5	2	0	0	0	1
Total	59	67	100	91	12	61	6	10
Change 1974-79		14%		-9%		408%		67%
Southern Section								
Albany	22	18	45	18	20	5	0	3
Columbia	12	30	25	68	6	15	1	1
Delaware	2	10	20	40	3	5	0	1
Fulton	10	5	23	1	3	2	0	0
Greene	8	23	35	23	2	12	0	0
Montgomery	5	3	20	7	0	1	0	0
Otsego	2	3	8	20	2	2	1	2
Rensselaer	15	7	25	13	15	7	0	1
Saratoga	36	4	25	17	8	5	0	2
Schenectady	7	4	20	12	2	4	0	1
Schoharie	2	12	12	6	3	6	0	1
Washington	4	10	15	5	1	12	0	1
Total	125	129	273	230	65	76	2	13
Change 1974-79		3%		-16%		17%		550%
Regional change 1974-79		7%		-14%		78%		188%

Table 8. NUMBER OF DIRECT MARKETING OPERATIONS,
BY REGION AND COUNTY, 1974 and 1979
Survey of Direct Marketing Operations,
New York State, 1979

Central Region County	Direct Sales Operations							
	Roadside Markets				Pick Your Own Farms		Retail Farmers' Markets	
	Commercial		Small					
	1974	1979	1974	1979	1974	1979	1974	1979
Broome	9	15	20	7	2	3	1	2
Cayuga	5	6	5	50	6	6	1	3
Chemung	8	3	10	1	3	3	0	0
Chenango	5	3	6	5	1	1	0	3
Cortland	2	7	25	40	0	2	1	1
Jefferson	5	3	15	8	2	3	0	1
Lewis	0	1	5	6	0	6	0	0
Madison	18	35	75	10	1	10	1	3
Oneida	19	10	30	15	5	5	2	2
Onondaga	23	20	30	30	15	40	3	4
Oswego	6	15	100	50	12	15	1	3
Schuyler	1	5	3	7	1	10	0	1
Seneca	12	9	10	14	4	12	0	1
Tioga	10	17	12	16	10	16	0	0
Tompkins	4	6	3	64	6	15	0	2
Total	127	155	349	323	68	147	10	26
Regional change 1974-79		22%		-7%		116%		160%

Table 9. NUMBER OF DIRECT MARKETING OPERATIONS,
BY REGION AND COUNTY, 1974 and 1979
Survey of Direct Marketing Operations,
New York State, 1979

		Direct Sales Operations							
Genesee Region		Roadside Markets						Retail Farmers' Markets	
County		Commercial		Small		Pick Your Own Farms			
		1974	1979	1974	1979	1974	1979	1974	1979
Allegany		2	2	15	0	1	0	0	0
Livingston		3	2	40	15	0	2	0	0
Monroe		45	75	35	125	10	50	3	4
Ontario		18	8	40	64	6	11	1	2
Steuben		14	7	45	24	6	8	0	2
Wayne		50	10	100	81	20	10	0	1
Yates		4	8	25	54	4	15	0	1
Total		136	112	300	363	47	96	4	10
Regional change 1974-79		-18%		21%		104%		150%	

Table 10. NUMBER OF DIRECT MARKETING OPERATIONS,
BY REGION AND COUNTY, 1974 and 1979
Survey of Direct Marketing Operations,
New York State, 1979

		Direct Sales Operations							
Western Region		Roadside Markets				Pick Your Own Farms		Retail Farmers' Markets	
County		Commercial	Small						
		1974	1979	1974	1979	1974	1979	1974	1979
Cattaraugus		10	3	12	10	4	13	0	0
Chautauqua		25	40	30	40	10	25	1	3
Erie		25	35	30	35	26	30	2	4
Genesee		5	6	15	15	5	4	1	1
Niagara		20	100	120	150	25	50	3	3
Orleans		6	30	15	70	5	20	0	0
Wyoming		<u>7</u>	<u>15</u>	<u>20</u>	<u>66</u>	<u>3</u>	<u>5</u>	<u>0</u>	<u>0</u>
Total		98	229	242	386	78	147	7	11
Regional change 1974-79		134%		60%		88%		57%	

Table 11. COUNTIES WITH RETAIL FARMERS' MARKETS¹, 1979
Survey of Direct Marketing Operations, New York State, 1979

County	Market Location	Number
Albany	Albany, Pearl St.; Albany, Madison Avenue; Delmar	3
Broome	Binghamton, Endicott	2
Cayuga	Auburn (2), Sennett	3
Chautauqua	Chautauqua Institute, Dunkirk, Jamestown	3
Chenango	Bainbridge, Greene, Norwich	3
Columbia	Hudson	1
Cortland	Cortland	1
Delaware	Walton (during county fair - 5 days)	1
Dutchess	Poughkeepsie	1
Erie	Broadway Market, Buffalo; Clinton-Bailey, Buffalo; East Aurora; Hamburg	4
Essex	Crown Point, Westport	2
Franklin	Malone	1
Genesee	Batavia	1
Herkimer	Herkimer, Little Falls	2
Jefferson	Watertown	1
Madison	Cazenovia, Hamilton, Oneida	3

continued

¹ This list of farmers' markets, in operation in 1979, was compiled from these sources:

- a) 1979 Survey of Direct Marketing Operations, New York State, completed by Extension field staff;
- b) Robert Lewis, New York State Dept. of Agriculture and Markets, New York City Office;
- c) Telephone conversations with a number of market managers and sponsors by the author.

Omitted from this list were markets which operated for only one day in 1979 and the farmers' markets located at three service areas, New York Thruway (Angola, New Baltimore, and Warners).

Table 11. cont'd.

County	Market Location	Number
Monroe	Genesee Valley Regional Market; Public Market; Chamber of Commerce Market, Rochester; North Chili	4
Niagara	Lockport, Niagara Falls, North Tonawanda	3
Oneida	Rome, Utica	2
Onondaga	Baldwinsville; Camillus; Central NY Regional Market, Syracuse; Syracuse Mall, downtown	4
Ontario	Canandaigua, Geneva	2
Orange	Middletown, Newburgh, Port Jervis	3
Oswego	Fulton, Oswego, Pulaski	3
Otsego	Middlefield, Oneonta	2
Rensselaer	Troy	1
St. Lawrence	Canton, Gouverneur, Massena, Potsdam	4
Saratoga	Clifton Park, Saratoga Springs	2
Schenectady	Schenectady	1
Schoharie	Cobleskill	1
Schuyler	Montour Falls	1
Seneca	Waterloo	1
Steuben	Bath, Corning	2
Tompkins	Ithaca, Trumansburg	2
Ulster	Saugerties	1
Warren	Glens Falls	1
Washington	Hudson Falls	1
Wayne	Lyons	1
Westchester	New Rochelle, Ossining	2
Yates	Penn Yan	1
Number of upstate counties		39
Number of markets		77
New York City (10 Greenmarkets, Jamaica Farmers' Market, Fulton Farmers' Market)		12
Total number of retail farmers' markets		89

Table 12. COUNTIES WITHOUT RETAIL FARMERS' MARKETS, 1979
Survey of Direct Marketing Operations, New York State, 1979

1. Allegany	10. Montgomery
2. Cattaraugus	11. Nassau
3. Chemung ¹	12. Orleans
4. Clinton	13. Putnam
5. Fulton ²	14. Rockland
6. Greene	15. Suffolk
7. Hamilton	16. Sullivan
8. Lewis	17. Tioga
9. Livingston	18. Wyoming

¹ The Chamber of Commerce in Elmira is planning to start a market in 1980.

² A local group sponsored a one-day market in 1979, with plans to start a market in 1980.

Table 13. NUMBER OF PRODUCE STORES SELLING ONLY RESALE PRODUCE¹
AND GARDEN CENTERS, INCLUDING GREENHOUSES, BY COUNTY
Survey of Direct Marketing Operations, New York State, 1979

County	Produce Stores Selling Only Resale Produce	Garden Centers and Greenhouses
Albany	1	19
Allegany	0	0
Broome	3	3
Cattaraugus	0	5
Cayuga	2	6
Chautauqua	2	5
Chemung	1	5
Chenango	0	4
Clinton	1	4
Columbia	2	10
Cortland	2	5
Delaware	0	15
Dutchess	25	71
Erie	4	50
Essex	1	7
Franklin	0	3
Fulton	0	4
Genesee	2	11
Greene	4	7
Hamilton	0	0
Herkimer	0	4
Jefferson	5	4
Lewis	0	0
Livingston	1	4
Madison	15	7
Monroe	150	50
Montgomery	0	5
Nassau	35	113
Niagara	5	18
Oneida	10	25
Onondaga	0	60
Ontario	1	10
Orange	8	50
Orleans	1	6
Subtotal	281	590

continued

¹ Includes roadside markets where all of the produce sold has been purchased for resale and specialty produce stores but not grocery stores or supermarkets.

Table 13. cont'd.

County	Produce Stores		Garden Centers and Greenhouses
	Selling Only	Resale Produce	
Oswego	2		25
Otsego	2		3
Putnam	0		6
Rensselaer	3		4
Rockland	1		29
St. Lawrence	2		8
Saratoga	1		3
Schenectady	4		2
Schoharie	1		7
Schuyler	0		5
Seneca	1		6
Steuben	3		8
Suffolk	20		300
Sullivan	13		3
Tioga	3		6
Tompkins	5		2
Ulster	20		15
Warren	1		8
Washington	0		9
Wayne	0		9
Westchester	10		150
Wyoming	3		10
Yates	0		1
Subtotal	95		619
Subtotal (previous page)	281		590
Total (excluding New York City)	376		1,209
New York City small stores 600+ pickup trucks 100+			